

TO: Public Library Directors  
Library System Coordinators

FROM: Cindy Tackett, Local Assistance Analyst, (916) 653-4192

DATE: August 24, 1999

SUBJECT: Interlibrary Loan Forms for FY 1999-2000

**Please read carefully. There are major changes to the interlibrary loan reimbursement program for fiscal year 1999/2000.**

The California Library Services Act (CLSA) interlibrary loan reimbursement program for public libraries will be augmented by Library of California (LoC) funding during fiscal year 1999/2000 as part of an expanded pilot multitype interlibrary loan program offering loan reimbursements to libraries throughout California. Public libraries will continue to be reimbursed for loans to libraries eligible to participate under CLSA; these reimbursements will be paid out of CLSA funds. However, beginning September 1, 1999, public libraries now may also request reimbursement for loans to libraries that are not eligible under CLSA but *are* eligible under the Library of California; these include libraries within for-profit institutions and non-institutional government libraries. Please see the attached eligibility guidelines for more information. Reimbursements for loans to these libraries will be paid out of LoC funds. Libraries claiming reimbursement for loans to both CLSA eligible libraries and the additional LoC eligible libraries will receive two checks, one from each fund.

The Library of California Board has allocated funds for the expanded pilot program through June 2000. It is unknown at this time if the pilot program will be extended into the 2000/2001 fiscal year or if it will become a permanent access services program under the Library of California. The Board may also discontinue the program at any time.

The addition of LoC funding has required changes in the ILL Transaction Report/Claim form for public libraries. There are five categories of libraries, three of which – A) public, B) academic, and C) school libraries – are essentially the same as previous years. The fourth and fifth categories both contain special libraries: D) Nonprofit and local/state government institutional libraries; and E) All other special libraries, including those in non-institutional government agencies and in for-profit organizations, corporations, institutions, etc. You no longer have to supply the names of the special libraries borrowing materials from you.

All Interlibrary Loan participants will use the enclosed new ILL forms and follow the same reporting deadlines as in previous years. Data will continue to be collected on a quarterly basis and is still due in the Budget Office **no later** than the 15th of the month following the end of the reporting period.

You will need to fill in the following information for each report:

- 1) Library Name and Library Account Number. If you do not know your Library Account Number, please call Cindy Tackett at (916) 653-4192 or Sue Whitehead at (916) 653-4033.
- 2) Reporting Period - You should check off the quarter which is represented by the data that is being returned, e.g., January-March data is the third quarter.

- 3) Make sure the form is signed; this is your legal claim for ILL reimbursement. Please remember that if you are charging a handling fee, you are not entitled to claim the transaction. Your signature acknowledges your understanding of this.
- 4) In the middle of the form you will notice three boxes under each category of loans. For those libraries who choose to track monthly data, there is one box for each month in the quarter. **Libraries are only required to fill in the total quarterly data section on the far right. Monthly recording of data is a library option.**

Interlibrary loan pilot program eligibility guidelines are enclosed. If you have questions, please contact Tom Andersen, CLSA Program Coordinator, (916) 653-7391 (e-mail: [tanderse@library.ca.gov](mailto:tanderse@library.ca.gov)) or Sandy Habbestad, CLSA Program Analyst, (916) 653-7532 (e-mail: [shabbest@library.ca.gov](mailto:shabbest@library.ca.gov)).

The four claim forms enclosed are intended to be a full year's supply, but should anyone need more forms, feel free to copy them or contact us and we will send you additional forms.

For your information, the Library of California Board has requested a study of the costs of providing interlibrary loan and direct loan services in California's multitype library environment. As part of this process, the consultants working on the study will be polling a small group of California libraries to assess the current funding situation and to test some potential options. Your library may be asked to participate in this poll. Contact Tom Andersen for more information.

If you have any questions, feel free to call.

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TA/users/LoC Loan/LoC ill expanded pilot public memo